



CGS

Complete Business Assessment

Print this document and keep it handy

Page 1: Business Wheel Assessment

Every business is a wheel. If a spoke is missing, it won't roll. Rate each

spoke: 0 = Major gap, 1 = Partially in place, 2 = Solid and documented

1. Offer & Delivery ____/2

☐ Do you have 3-5 clearly defined offers that clients can easily choose from? ☐ Is your delivery process consistent so every client receives the same quality?

2. Tasks & Team Rhythm ____/2

☐ Does your team follow a shared weekly rhythm (meetings, check-ins, reviews)? ☐ If you stepped away for a week, would your team know exactly what to do?

3. Client Journey Mapping ____/2

☐ Can a new prospect clearly see their next step from first contact to purchase? ☐ Is the journey documented so anyone on your team can replicate it?

4. Visibility & Outreach ____/2

☐ Do you post or share consistently in ways that build awareness? ☐ Do you have a system that nurtures prospects beyond the first

contact?

5. Contact & Client Tracking ____/2

- ☐ Is every lead and client tagged and tracked in your CRM (no "lost contacts")?
- ☐ Can you see at a glance who's new, who's engaged, and who's ready?

6. Documentation & SOPs ____/2

- ☐ Do you have written SOPs for your core business processes?
- ☐ Could another team member follow them without confusion?

7. Inbox & Calendar Management ____/2

- ☐ Is your inbox consistently clean, with no missed important emails?
- ☐ Could another operator run your inbox/calendar without disruption?

8. Measurement & Clarity ____/2

- ☐ Do you know what's complete, in progress, and blocked across your business?
- ☐ Do you review your metrics weekly, monthly, and quarterly?

9. Onboarding ____/2

- ☐ Do you send automated, branded welcome emails immediately after purchase?
- ☐ Do clients leave onboarding knowing what's happening and who to contact?

10. System Maintenance & Improvement ____/2

- ☐ Do you review and refine your business systems on a set schedule?
- ☐ Is at least 80% of your work transferable to another operator if needed?

Your Business Wheel Score: ____/20

16-20: Your wheel is strong - focus on optimization

10-15: Missing critical spokes - your wheel wobbles

Under 10: Your wheel won't roll - major gaps need immediate attention

Page 2: AI Decision Checklist

Before Adding Any AI Tool

- ☐ **Can I verify what it produces?**

If it claims "studies show X," can I check if those studies exist?

- ☐ **Do I know where my data goes?**

Am I uploading client info, financials, or strategy docs to train someone else's model?

- ☐ **Will this actually save time or just add complexity?**

Am I managing three platforms instead of simplifying my workflow?

- ☐ **Who's responsible when it gets something wrong?**

When it misquotes a price or gives bad advice, who fixes the client relationship?

- ☐ **Does this solve a real bottleneck or just look cool?**

Is this addressing actual pain, or am I chasing shiny object syndrome?

If You're Already Using AI

- ☐ **Am I still reviewing everything before it goes live?**

Or am I copy-pasting because it "looks good enough"?

- ☐ **Does my content still sound like me?**

Compare your posts from 3 months ago to now. Same voice?

- ☐ **Can I operate without this tool if needed?**

What breaks if ChatGPT is offline for a week?

- ☐ **Are clients getting better service, or just faster responses?**

Is speed actually bringing you closer to clients, or just filling space?

- ☐ **Am I building trust or just creating more noise?**

Are you learning and improving, or just producing more content faster?

Emergency Check

- ☐ **If I had to explain to my best client that AI wrote this, would I be comfortable?**

If you can't check this box, pause before sending.

What This Means

AI can speed up a broken wheel, but it's still broken.

Fix the spokes first, then add the speed.

Need help building a complete wheel that actually rolls?

Let's talk about fixing what's broken, starting with your biggest gap.

Call: [619-949-2202]

Email: [Team@cgsglobal.net]

Web: [<https://cgsglobal.net/home>]

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You are not alone.

We are here to help!

© CGS - *Because execution means building systems that work, with or without AI.*